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OCA 1101-87

29 MAR 1989

MEMORANDUM FOR: 

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Office of Congressional Affairs

VIA:

Deputy Director of Personnel for  
Employee Benefits and Services

FROM:

  
Chief, Retirement Division

SUBJECT:

Bill to Restore 3-year Recovery Rule on Annuities

REFERENCE:

Memo frm OGC to OCA dated 10 March 1989,  
Same Subject

1. Subject Bill (H.R. 214) seeks to amend title 5, USC, to restore the 3-year basis recovery rule with respect to annuities under chapters 83 and 84 of such title for federal income tax purposes. This legislation would not apply to the CIA Retirement and Disability System (CIARDS).

2. Retirement Division (RD) would like to be appraised of the progress of this pending legislation. Further, as suggested in referenced memorandum, RD recommends that the Agency seek an amendment to the Bill to expressly cover CIARDS in order to ensure that CIARDS annuities are extended the same basis recovery treatment applicable to the Civil Service and Federal Employee's Retirement Systems.

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